

USER Manual for the TRAVEL SW Module of GIS HRM

For digitised business travel management, CNIT has equipped itself with the TRAVEL SW Module of GIS HRM platform by Ranocchi Software. The purpose of this document is to provide the user with an overview of the SW module's main methods of use.

Once you have obtained the login credentials¹, you can access the CNIT GIS HRM platform at <https://cnit.gishrm.online>. At the **first login**, you can change your password by choosing the “User Profile” item in the User Menu, which you can open by clicking on your name on the top right.

To **request an authorization for a business trip**, select “Travel List” from the Business Travels menu on the left. On this page, you can create a new business trip and/or search and browse the progress of ones that you have already requested. After clicking on “New Trip”, set:

- the start and end dates,
- the type (indicating whether the expenses will be incurred in Italy or abroad),
- the destination,
- the project/order to which the expense is to be charged (indicating the first two or more characters of the project acronym or the surname of the scientific coordinator, the platform shows the foreseen possibilities²),
- the resource (by selecting your name),
- a note to specify the purpose of the trip, and possibly the project (if this has not yet been entered into the platform) and the request for an advance limited to travel expenses, conference registration fees and accommodation expenses paid directly by the user (documentation of such expenses must be attached in advance to the reimbursement request)³,
- and possibly the flag to indicate the need to use one's own vehicle, releasing the CNIT from any consequent responsibilities (by clicking on the appropriate link it is possible to view the text of the declaration that is being signed).

The screenshot shows the 'NUOVA RICHIESTA TRASFERTA' form. The fields are as follows:



- Data inizio:** 04/11/2024
- Data fine:** 07/11/2024
- Tipologia:** Rimborso spese Italia
- Destinazione:** Roma
- Cliente:** Seleziona...
- Risorse:** Test Test
- Nota:** Partecipazione a riunione plenaria ...
- Manleva in caso di utilizzo di mezzo proprio:**
- Commessa:** Selezione una commessa...
 - mas
 - ELEDIA DIDACTIS 2023 - MASSA 105006.38
 - GRECO - MASSEI 208015.5**
 - HUAWEI TECHNOLOGIES YBN2021035015 MASSA - MASSA 105004.118
 - HUAWEI YBN2018085100 MASSA - MASSA 105004.73
 - HUAWEI YBN2020055C GRECO - MASSEI 208015.5 004.112
 - HUAWEY TECHNOLOGIES ITALIA SRL MASSA - MASSA 105004.100

¹ Username = institutional email + password provided by email and, in any case, recoverable using the “Forgot password” function.

² There are two special cases: *Institutional Activities* (for institutional trips) and *Other* (if the project/order has not yet been entered into the platform).

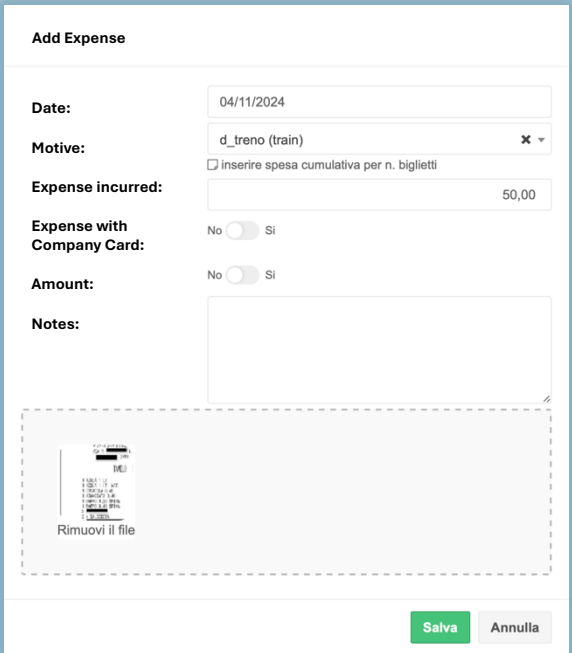
³ The advance expenses will then be subtracted from the total when the mission is paid.

By clicking the “Confirm” button, you will generate a request that requires approval first by the Project Manager (if provided in the platform) and then by the Site Manager⁴. Following approval, on the “Travel List” page the transfer is highlighted with a green thumb raised (in place of the similar gray symbol). By clicking on the relative identification number, the “Transfer Detail” page opens (with the details of the request and approvals).

NUMERO	TIPOLOGIA	RISORSA	DATA	DESTINAZIONE	CLIENTE	RIMBORSI	
TR-2024-00572	Rimborso spese Italia	Test Test	04/11/2024 07/11/2024	Roma		0,00 €	 

From the “Transfer Details” page, you can **enter the individual expenses where reimbursement is requested** (or modify or delete them). Specifically, clicking on “Add Expense” opens a form (for each individual expense) where you indicate the following data:

- the (final) date of the expense;
- the motive (i.e., the type of expense that can be chosen from the different items available);
- the incurred expense amount;
- if the expense was paid with a company card or directly paid by the CNIT⁵ (in this case, the expense is not reimbursed but automatically entered in the company accounting system and valued at zero in the reimbursement);
- if the expense (limited to travel expenses, conference registration, and accommodation expenses) was paid directly by the user, it is possible at this stage to request an advance payment by indicating this in the notes field and inserting the documents certifying the direct payment of the expenses;
- if the expense was incurred in a currency other than EURO (report the daily exchange rate provided by the European Central Bank);
- any other information specific to the particular expense item.



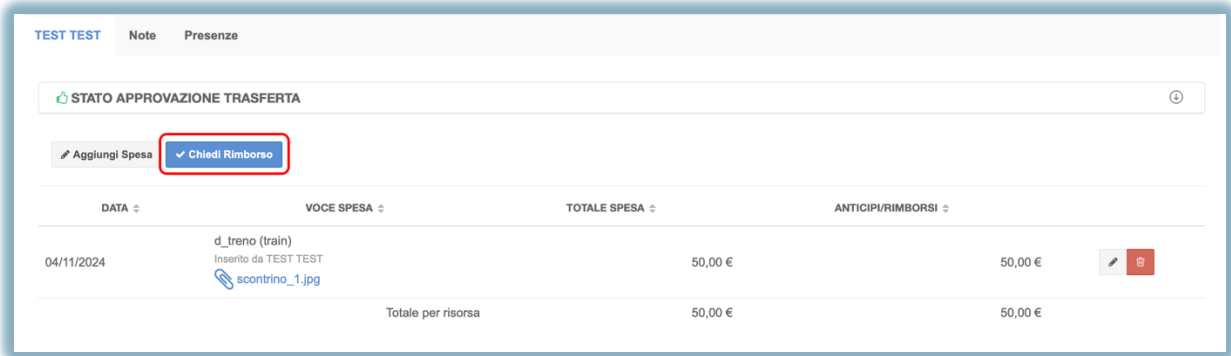
For each expense, add the relevant supporting documents (receipt, invoice, etc.) in image or PDF formats by simply dragging it into the appropriate box⁶.

At the end of the expense entry activity, click on “Request Reimbursement”. This causes the reimbursement request to be sent to the administrative manager, and you can no longer modify the expenses entered.

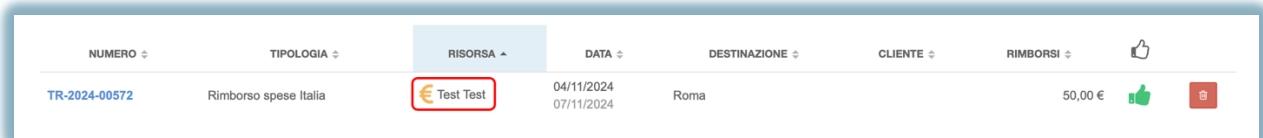
⁴ An incorrect request can be deleted within the same day of creation, even with the approval of the responsible persons.

⁵ This occurs when, for reasons of economic convenience, it is preferable to request the booking of travel and accommodation directly to own administrative office (headquarters or laboratory) which provides for the issuing of an order and direct payment by the CNIT to the travel agency or to the organizers of the conference/event.

⁶ It is recommended to enter a cumulative expense item for each type of expense, then adding the related justifications in chronological order

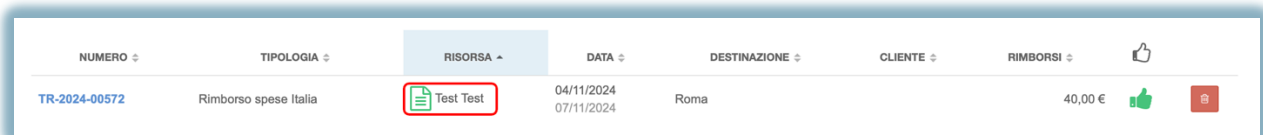


Following the reimbursement request, the trip is highlighted with a yellow EURO symbol in the Resource column of “Travel List” page.



Following the verification and authorization for reimbursement request by the administrative manager, the yellow EURO symbol in the “Travel List” is replaced by

- a green EURO symbol if the Administrative Manager carries out a partial verification (for example, if an advance payment of some expenses has been requested);
- a symbol indicating waiting for validation by the Project Manager (if provided in the platform) and the Site Manager, if the Administrative Manager carries out the final verification



By clicking on the travel identification number, you can check the system for any changes and comments on the expenses submitted for reimbursement. The notes tab also allows you to exchange notes and documents with the administrative manager.

TEST TEST		Note	Presenze
STATO APPROVAZIONE TRASFERTA			
Autorizzato 11 minuti fa rimborso per il mese di 11/2024 da TEST3 TEST3			
STATO VALIDAZIONE TRASFERTA			
DATA	VOCE SPESA	LE SPESA	ANTICIPI/RIMBORSI
04/11/2024	d_treno (train) Modificato da TEST3 TEST3 scontrino_1.jpg	50,00 €	40,00 €
Totale per risorsa		50,00 €	40,00 €

Following validation by the Project Manager (if provided for in the platform) and the Site Manager, you will receive a specific notification via email, and on the “Travel List” page the validation waiting symbol is replaced by a check symbol to indicate the closure of the process.

NUMERO	TIPOLOGIA	RISORSA	DATA	DESTINAZIONE	CLIENTE	RIMBORSI	
TR-2024-00572	Rimborso spese Italia	Test Test	04/11/2024 07/11/2024	Roma		40,00 €	👍 🚫

Lastly, by selecting “Reimbursement Summary” in the Business Travels menu on the left, you can view the approval status of your refund requests with your details.